ePROCUREMENT 8.8

PO ITEM CATEGORY CHANGE

A PO line's Item Category can be directly changed before a PO is Approved/Dispatched. After that time, the Item Category is grayed-out and cannot be directly changed. What must be done is to move amounts that are not invoiced from the existing PO line to a new PO line and enter the desired Item Category on the new PO line.

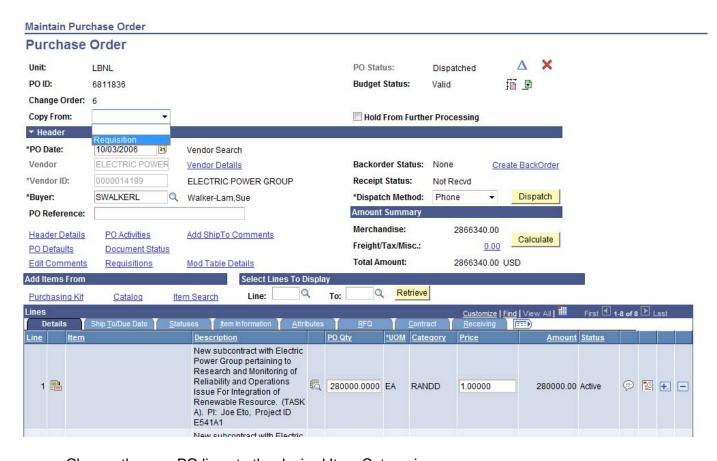
This topic will show you how to move unused amounts to the desired Item Category on a PO line.

Go to the PO Activity Summary to see which lines have been invoiced and whether Case 1 or 2 below applies. Use the following steps to change Item Categories for existing PO lines:

- Begin by 1) canceling OR 2) reducing the existing PO lines to what was spentdepending on the case below:
 - 1. For Case 1 (there are no invoices on the PO line) cancel the old line as follows:
 - Click Schedule icon, Distributions icon, Req Detail
 Req Detail tab, and the pink eraser . (Note the Requisition Number)
 - Return to the main PO page.
 - Click the **Statuses** tab then click the red **X** to cancel the line
 - 2. For Case 2 (the line has been invoiced) reduce the old line as follows:
 - Change the line from its existing quantity to **0** then click the Refresh button at the bottom. (This assumes the dollars are in the quantity and the price is \$1.)
 - A dialog box will pop open that says, "Schedule is partially matched with quantity 41846.25. Cannot reduce quantity lower than quantity matched."
 Jot down the amount invoiced.
 - Enter the amount invoiced into the PO line's quantity box.
- Click Yes to Create a Change Order
- Click Yes to "Increase requisition open quantity for Req 0000827553 line 1." This will send the unused requisition quantities back to be sourced again (send it back to the requisition pool).
- Save the PO (but don't Approve it yet). This will send the quantities back to the requisition pool.

Page 1 of 1 9/4/07

• Click the **Copy From Requisition** drop down (in the top of the PO Header) and add the requisition line(s) back onto the PO. (The requisition number also appears in the Requisition link on the PO Header.)



- Change the new PO lines to the desired Item Categories.
- Approve/Save the PO.

Page 2 of 2 5/8/07